CableVision

This Week in Cable, pages 14-20 April 2, 1984, Volume 9, Number 31

COMPETITION FOR 'BUSINESS TIMES'

A new edition of the U.S. Chamber of Commerce's *Biznet News Today* will premiere live over USA Network next week, competing against ESPN's daily financial news journal, *Business Times*.

SPORTS NETS TO MERGE

Warner Amex Cable's trio of Home Sports Entertainment regional pay services in Pittsburgh, Houston and Dallas are poised to merge with Cablevision Systems—The Washington Post Co.'s Sportchannel in what officials hope will grow into the "HBO of regional sports."

RITCHIE TOUTS CCI CAMPAIGN

Council for Cable Information Chairman Dan Ritchie accentuates the positive in a speech in Washington, even as reports circulate that one major CCI participant has doubts about the image campaign's strategy—and may seek to reduce its pledged funding commitment.

WARNER AVERTS TAKEOVER

Warner Communications averts a takeover, attempt by acquiring nearly six million Warner shares held by Murdoch's New International for $31 a share. Meanwhile, the parent of Warner Amex Cable continues its cost-cutting moves by laying off 200 Atari employees.

What's in the Sections

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Cable News Network prepares for live distribution in Japan via TV Asahi Broadcasting Co., a major Japanese broadcaster that recently co-produced a QUBE special with Warner Amex Cable.

SPECIAL REPORT 24

Agency executives are generally pleased with the amount of national data on cable viewer habits—but on the local scene, it's another story. High costs and the lack of established methodology make it difficult for the local operator to obtain the information needed to convince local advertisers of cable's worth. In a special report, *CableVision* looks at the state of local market research, and what the industry is doing to fill the void.

BUSINESS 43

New York City may become the site of the nation's first 550 MHz cable system. However, some experts have concerns about how quickly the new technology will prove itself in the field and when it will be ready to be manufactured in large quantities.

GOVERNMENT & LAW 47

Berkshire Cablevision's legal case challenging Rhode Island's public access rules is set for a court hearing April 3. The operator maintains the requirements violate the Constitution.

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About the cover

Art Director Brad Hamilton designed this week's cover, featuring CBN Cable.

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PLUS

CBN Cable, The Nashville Network gain appeal

It's the for-profit parent of the Christian Broadcasting Network—but CBN Cable, an ad-supported service, not only makes money, but attracts a broad-based audience with family oriented programming supplemented by religious fare. And the mix appears to be working. Also in this week's *CV Plus*: The Nashville Network not only has survived its first year, but attracts a loyal, almost cultish following—possibly the harbinger of profits to come.

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BPA

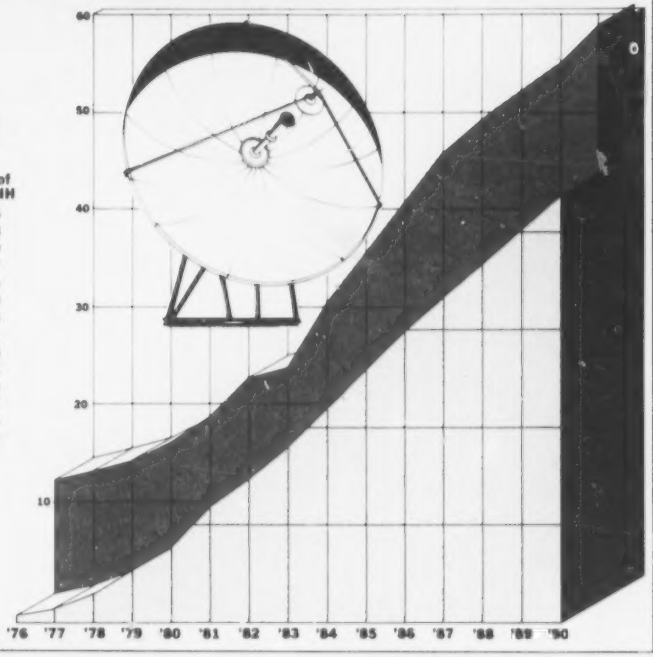
CABLE STATS

Pay/basic cable growth

Legend: Basic Subs ■ Pay Subs □

Year	Basic Subscribers	% of TVHH	Pay Subscribers	% of TVHH
1990	58,900,000	62	43,700,000	46
1989	54,988,000	59	40,076,000	43
1988	52,098,000	57	36,560,000	40
1987	49,280,000	55	33,152,000	37
1986	45,656,000	52	29,852,000	34
1985	40,467,000	47	25,830,000	30
1984	35,448,000	42	21,944,000	26
1983	30,300,000	36	17,900,000	21
1982	26,016,000	32	14,634,000	18
1981	22,596,000	28	11,804,000	14
1980	18,672,000	24	7,780,000	10
1979	16,023,000	21	5,341,000	7
1978	14,155,000	19	2,980,000	4
1977	13,194,000	18	1,466,000	2
1976	12,094,000	17	565,000	1

Pay, basic subscriber counts for 1984-1990 are projections



Cable barometer

Television households (TVHH) .. 83,500,000

Homes passed by cable (HP) 53,641,000

Percent of TVHH passed by cable 64.2%

Basic cable subscribers 30,300,000

Percent of TVHH with basic cable .. 36.3%

Percent of HP with basic cable .. 56.4%

Pay cable subs 17,900,000

Percent of TVHH with pay cable 21.4%

Percent of HP with pay cable 33.4%

Percent of basic subs with pay cable 59.1%

Figures are as of Dec. 31, 1983

Franchising calendar

This chart examines the franchise status of communities since February 1984

Arizona
Apache Junction—proposals received from DCA Cablevision and Dowden Communications; preliminary award expected 4/84 (6,937 homes)

California
Avalon—proposals received from Catalina Cable TV, T&B Communications and The Western Co; award expected 5/84 (1,500 homes)
Chino—only proposal received from Buena Vista Cable TV (12,000 homes)
Claremont—negotiating with Group W (9,800 homes)
Commerce—negotiating with KTS Corp. (3,000 homes)
Costa Mesa—award to Copley-Colony Cablevision 3/5/84 (32,637)
Durante—consultants reviewing proposals from KTS Corp., Buena Vista Cable and Public Service Cable (7,100 homes)
East San Fernando Valley—award to United Cable 9/16/83 (166,000 homes)
East Yolo—proposals submitted by Cablevision, Sonics, Yolo Communications, and Federal Communications Inc. (10,000 homes)
La Puente—only proposal submitted by United Cable (8,600 homes)
Lomita—award to Colony Communications 9/6/83 (8,137 homes)
Los Altos—proposals received from Joint Cities Cable TV, Video Engineering and United Cable TV; award expected 4/84 (9,000 homes)
Los Angeles—award to Community Cable Entertainment Services System 9/16/83 (180,000 homes)
Norco—award to Falcon Cable of Riverside 9/21/83 (6,300 homes)
Palo Alto—proposals received from Century Federal, City Cable Partners, Pacific Telephone, Marsh Media/Public Service Cable and Cable Communications Co-op of Palo Alto (22,000 homes)
Pico Rivera—negotiating with California Cablesystems; award expected 3/84 (15,500 homes)
Placentia—award to Group W 2/7/84 (1,200 homes)
Sacramento—award to Cablevision Systems 11/22/83 (360,000 homes)
San Gabriel—negotiating with Falcon Communications (11,600 homes)
South Monrovia—RFP re-issued; proposals due 3/84 (5,450 homes)
Sunnyvale—refranchising award to Sunnyvale Cable TV 2/14/84 (43,000 homes)
West Covina—award to Falcon Communications (28,000 homes)
Yorba Linda—deadline extended for statements of interest (12,000 homes)

Colorado
Larimer County—award to Cable Systems 8/22/83 (1,500 homes)
Loveland—award to Scripps Howard 9/26/83 (1,000 homes)

Delaware
Wilmington—accepting proposals from cable consultants to review current system (140,000 homes)

District of Columbia
proposals received from D.C. Telecommunications Development Corp., Capital City Cable and District Cablevision Inc. (254,000 homes)

Florida
Fellsmere—proposals received from Private Cable and Sci Ad
Tierre Verde—award to Centel 8/9/83 (2,000 homes)

Illinois
Chicago—City Council awarded first negotiating rights for each area as follows: Area I to Cablevision Systems (300,000 homes); Area II to Group W (217,000 homes); Area III to Group W (193,000 homes); Area IV to Chicago Cable Communications (TCI/Cross Country joint venture) (226,000 homes); Area V to Continental Cablevision (188,000 homes)
Countryside—preliminary award to Cablevision of Chicago (2,200 homes)
Elmwood Park—drafting RFP (9,500 homes)
Harwood Heights—award to MetroVision 10/11/83 (2,000 homes)
Naperville—RFP re-issued (17,000 homes)
St. Charles, Geneva—award to Centel 2/21/84 (10,000 homes)
Villa Park—negotiating with Multimedia (7,100 homes)
Wheaton—negotiating with Centel; award expected by 3/84
Winnetka—decision to have cable has been postponed (13,000 homes)
Woodbridge—negotiating with Multimedia (260 homes)

Iowa
Clearfield—award to Afton Cablevision 9/20/83 (150 homes)
Diagonal—award to Afton Cablevision 8/30/83 (200 homes)
Morning Sun—drafting RFP (450 homes)
Murray—award to Afton Cablevision 8/30/83 (280 homes)

Kentucky
Calloway County—award to Bluegrass 12/13/83
Danville—award to RV Cablevision 1/13/84 (12,800)
Fulton—RFP re-issued (2,400 homes)
Greenville, Central City and Muhlenburg County—award to TCI 1/84 (13,000 homes)
Loretto—RFP deadline extended
Mayfield—franchise renewal granted to ATC 9/83 (4,500 homes)

Maine
Harpswell—award to Video Vision 8/16/83 (2,800 homes)
Hermon—award to Maine Cable Co. 8/17/83 (1,062 homes)

Maryland
Baltimore—RFP deadline extended until 3/28/84 (302,000 homes)
Carroll County—award to Prestige Cable 10/14/83 (30,000 homes)
Easton—City Council approved municipal ownership 6/83; construction to start by 11/83 (3,600 homes)

Massachusetts
Belchertown—no responses to RFP
Belmont—exploring municipal ownership of cable
Berkley, Dighton, Freetown—proposals submitted by Continental Cablevision
Boxborough—proposals submitted by Nashoba Communications and Adams-Russell (3,100 homes)
Boylston—award to Boylston Municipal Light Co. 1/9/84 (1,200 homes)
Cambridge—expect RFP issuance 3/84 (43,000 homes)
Dedham—preliminary award to Bay Cable TV
East Bridgewater—award to Campbell Communications denied award; Campbell is appealing (2,500 homes)
Easton—award to Continental Cablevision 1/9/84
Groton—proposals submitted by Nashaba Cable, Northeast Cable TV and United Cable
Hamilton and Wenham—award to Continental Cable 3/5/84 (2,300 homes)
Holden—award to Greater Worcester Cablevision 3/5/84 (4,000 homes)
Holiston—preliminary award to Massachusetts Cablevision Systems Inc. (3,922 homes)
Lincoln—proposals received from Adams-Russell, New Communications Corp. and TeleCommunications Inc.; preliminary award expected 4/84 (1,700 homes)
Marblehead—restarting franchising process
Medfield—only proposal from Massachusetts Cablevision (3,400 homes)
Mendon—restarting franchise process (1,200 homes)
Middleborough—proposals from Middleborough Gas & Electric, Continental Cablevision and Campbell Cable Systems
Nahant—only proposal from Warner Amex; no action until summer 1984 (1,433 homes)
Norfolk—only proposal from Massachusetts Cable; award expected 4/84 (1,800 homes)
Pembroke—award to Campbell Communications 10/83 (3,500 homes)
Pepperell—award to United Cablevision of Connecticut 10/11/83 (2,800 homes)
Plympton—award to Campbell Communications 2/13/84 (650 homes)
Sandwich—only proposal received from Campbell Communications (5,000 homes)
Seekonk—preliminary award to Massachusetts Cablevision (6,000 homes)
Shirley—RFP deadline extended until 3/26/84 (1,627 homes)
Shrewsbury—final award to Shrewsbury Electric Light (8,500 homes)

CABLE STATS

Southborough—only proposal from Worcester Cablevision
Sterling—proposals received from Wachusett Cablevision and Sterling Electric Light Co.; award expected 6/84 (2,000 homes)
Stow—only proposal received from Adams-Russell (1,600 homes)
Townsend—award to Nashoba Communications 11/83 (2,306 homes)
Upton—only proposal received from Worster Cablevision Inc. (1,600 homes)
Walpole—award to Massachusetts Cablevision 10/83 (5,676 homes)
Wayland—proposals under review; award expected by 7/83. (3,500 homes)
West Bridgewater—award to Continental Cablevision 11/7/83 (2,000 homes)
Westminster—preliminary award to Adams-Russell 12/83 (1,000 homes)
Weston—proposals received from Adams-Russell, Continental Cable Cooperative, Waylen Cable Cooperative and Kalba Bowen
Westport—preliminary award to United Cablevision. Funding appealed by Westport Cable Television (5,500 homes)

Michigan
Bloomfield Township, Bloomfield Hills—award to Booth Communications 9/12/83 (15,000 homes)
Detroit—award to Barden (471,000 homes)
Homer Township—negotiating with Getty TV; award expected 5/84
Jerome Township—award to Whitney Cablevision
Lake Orion—proposal submitted by Tribune United, Concord Telecommunications and Multi-Cablevision
Monroe—City Council awarded franchise to Communication and CableVision Inc. to complete with existing franchised cable system, Monroe Cablevision
West Broomfield, Keego Harbor, Orchard Lake, Sylva Lake—negotiating with Continental Cablevision (16,437 homes)
West Oakland County—award to Greater Media 11/23/83 (32,581 homes)
Westland—award to Continental Cablevision 2/84 (29,000 homes)

Minnesota
Afton, Cottage Grove, St. Paul Park, Denmark, Grey Cloud, Newport, Woodbury (South Washington County Cable Commission)—award to Telephone and Data Systems 1/13/84 (12,664 homes)
Albertville, St. Michael—award to Carlos Padraja 10/83 (637 homes)
Arlington, Gaylord, Winthrop, Gibbon, Green Isle—award to Dowden Communications 9/9/83 (2,568 homes)
Atwater—award to Armco Communications 8/83 (463 homes)
Belle Plaine—expect RFP to be issued 3/84
Big Lake, Buffalo, Cokato, Dassel, Delano, Elk River, Monticello, Rockford, Watertown, Maple Lake—proposals received from Rite Cable and Dow-Sat Cable of Minnesota
Blaine, Centerville, Circle Pines, Coon Rapids, Lexington, Ham Lake, Spring Lake (North Central Suburban Cable Communications Commission)—award to Group W 9/9/83 (27,191 homes)
Brooten—award to Armco Communications 8/83 (297 homes)
Chanhassen, Carver County and Hennepin County—award to Dowden Communications 1/5/84
Clarkfield—award to DeSutter Cablevision 10/83 (475 homes)
Deer River—award to Deer River Tel. Co. 9/83 (373 homes)
Dodge Center—award to Dowden Communications 9/9/83 (700 homes)
Eagle Bend—award to Parker's Prairie Tel. Co. 9/83 (517 homes)
Foley—award to Westel Communications 10/83 (575 homes)
Forest Lake, Forest Lake Township, Columbus Township, Scandia Township—award to Citation Cable 11/83 (5,619 homes)
Grand Marais—award to Cable-Tron 9/9/83
Grove City—award to Armco Communications 8/83 (248 homes)
Hanfurn—award to Ada Cable 8/83 (147 homes)
Heron Lake—award to B&R Electronics 10/83 (313 homes)
Lewiston—award to TeleCommunications 10/83 (475 homes)
Maple Plain—RFP issued; proposals due 4/10/84 (481 homes)
Menahga—award to West Central Tel. Co. 8/83 (457 homes)
Minneapolis—Storer in north sold to Rogers in south 8/83 (170,000 homes)
Minnetrista, Spring Park, Shorewood, Medina, St. Bonifacius, Excelsior, Deephaven, Woodland, Victoria, Tonka Bay, Orono, Minnetonka Beach, Greenwood, Long Lake (Lake Minnetonka Cable Communications Commission)—award to Dowden Communications 12/19/83 (11,682 homes)
New Richland—award to Westel Communications 10/83 (503 homes)
Northfield, Northfield Twp., Dundas, Bridgewater Twp., Rice County, Waterford Twp., Dakota County—award to Nor-Com Video 12/9/83 (4,416 homes)
Oakport Township—award to Spectrum Communications 10/83 (200 homes)
Oklee—award to Garden Valley Tel. Co. 10/83 (242 homes)
Parker's Praire—award to Mid-West Tel. Co. 10/83 (400 homes)
Savage—drafting RFP (272 homes)
Stillwater, Bayport, Oak Park Heights (Central St. Croix Valley area)—award to Telephone and Data Systems 8/12/83 (6,000 homes)
Trimont—award to Terril Tel. Co. 10/83 (351 homes)
Wabasso—award to Star Gazers 10/83 (301 homes)
Waconia—beginning process (1,024 homes)
Wayzata—award to Dowden Communications 1/83 (1,800 homes)
West St. Paul—proposals received from Continental Cablevision and Rite Cablevision (24,032 homes)
Windom—plan municipal ownership (1,600 homes)

Missouri
St. Louis—proposals received from St. Lewis City Communications and St. Lewis Cablevision Partners; award expected 4/84 (178,000 homes)

Nebraska
Bancroft—award to Midlands 12/5/83 (350 homes)

New Hampshire
Hampstead—final award to Rockingham Cablevision (1,500 homes)
Manchester—no proposals submitted by deadline
Newton—proposals received from Harron Communications and New England Cablevision; award expected 4/84 (1,124 homes)
Pelham—negotiating with Harron Communications (2,500 homes)
Sandown—only proposal from Harron Co. (800 homes)
Wolfeboro—negotiating with Community TV (833 homes)

New Jersey
Jersey City—determining cable options
Patterson—plan municipal ownership (55,000 homes)

New York
Beekman—Dutchess County Cablevision submitted only proposal (2,100 homes)
Mayville—award to U.S. Cable 9/26/83 (5,430 homes)
Mt. Upton—NewChannels denied award; future uncertain
New York City—final awards for outer boroughs 6/30/83: Warner Amex—Western Brooklyn, Northern Queens; Cablevision Systems—Eastern Brooklyn, Bronx; Cox Cable—Staten Island; Vision Cable—Northeastern Staten Island; ATC—areas of Queens; Queens Inner Unity Cable—Southern Queens.
North Salem—RFP re-issued; deadline extended until 5/31/84 (1,100 homes)
Norwich—NewChannels withdrew application; exploring other alternatives (100 hoems)
Portland—negotiating with Tribune Cable (155 homes)
Tully—award to NewChannels 8/29/83
Union Vale—only proposal from Consolidated Communication (775 homes)

North Carolina
Camden County—drafting RFP
Jackson—statements of interest being accepted (400 homes)
Pamlico County—award to Kounty Kablevision 10/17/83 (4,000 homes)

Ohio
Avon—proposals received from Avon Cable TV and Space Cable of Ohio; award expected 3/84 (2,000 homes)
Batavia Township—award to So-Comm 9/20/83 (4,000 homes)
Bethel—award to Cable Management Group 9/19/83 (1,200 homes)
Brooklyn—municipal ownership under consideration (4,000 homes)
Cleveland—city still deliberating municipal versus private ownership
Garfield Heights—award to Space Cable 9/23/83 (12,000 homes)
Lordstown—deliberating municipal versus private ownership
Oberlin—proposals received from Oberlin Cable Co-Op and Grafton Cable; award expected 2/84 (2,600 homes)
Quincy—final award granted to Cable Management Group 8/83 (250 homes)
Russell—award to Cablevision of Geauga 9.14.83 (1,500 homes)

Oregon
Amity—award to Eagle Cable Systems Inc. 1/9/84 (400 homes)
Cottage Grove—award to McCaw Communications (2,500 homes)
Dunthorpe—negotiating with Liberty Communications (TCI) (507 homes)
Sylvan—negotiating with Liberty Communications (TCI) (1,200 homes)

Pennsylvania
Franklin Township—preliminary award to Scatcom Cable
Philadelphia—city is divided into four areas with proposals submitted as follows: Area 1—Greater Philadelphia Cablevision and Independence Cable of Philadelphia; Area 2—Independence Cablevision, Wade Communications and Philadelphia Inner City Cablesystems; Area 3—Rollins Cablevision, Independence Cablevision, Cox Cable and Comcast Communications; Area 4—Rollins Cablevision, Comcast Communications and Cablevision Systems; new administration waiting from assessment of current proposals (each area 155,000 homes)

Rhode Island
Newport (Middletown, Portsmouth, Tiverton, Little Compton)—reviewing proposals (29,500 homes)

Texas
Azle—proposals received from Tetran and Southern Cablevision Corp. (2,200 homes)
Plano—award to TeleCable 8/83 (30,000 homes)

Virginia
Berryville, Clarke County—negotiating with Mid Atlantic Network; award expected 4/84 (600 homes)
Dinwiddie County—award to Crater General Communications 11/2/83
Manassas—considering municipal ownership of cable (5,510 homes)
Suffolk—award to Suffolk Cable Communications 2/1/84 (16,697 homes)

Washington
Granger, Toppenish, Wapato, Zilah—award to McCaw Communications 9/83 (5,300 homes)

Wisconsin
Hayward—no bids submitted (1,000 homes)
Hudson—award to Telephone and Data Systems 11/21/83
Hustisford—award to Cable Communications Corp. 12/5/83 (350 homes)
Johnson Creek—award to Telesignal of Milwaukee 9/83 (400 homes)
New Glarus—negotiating with Teledata Systems; award expected 4/84 (675 homes)
Waterford—negotiating with Total TV (600 homes)

Wyoming
Gillette—Westel withdrew bid; negotiating with Televents (7,500 homes)

Source: Titsch Communications Inc.

Franchising in the top 50 markets

Rank	Market	Status of core city
1	New York	Manhattan—2-OP; outer boroughs 8-FG
2	Los Angeles	City is divided into 14 areas (A-n): 10-OP, 2-UC, 2-FG
3	Chicago	City is divided into five areas: FG
4	Philadelphia	City is divided into N,S,E,W-FP; additional area in S-OP
5	San Francisco	OP (system to be upgraded)
6	Boston	OP
7	Detroit	FG
8	Washington, D.C.	FP
9	Cleviand	BP
10	Dallas/Ft. Worth	Two systems-OP
11	Houston	Two systems-OP
12	Pittsburgh	OP
13	Miami	OP
14	Seattle/Tacoma	City is divided into five parts (4-OP); 1-BP); Tacoma-OP
15	Minneapolis/St. Paul	OP/FG
16	Atlanta	OP
17	St. Louis	FP
18	Tampa/St. Petersburg	UC/OP
19	Denver	OP
20	Baltimore	RP
21	Sacramento/Stockton	FG/OP
22	Indianapolis	Two systems-OP
23	Portland	Three systems-OP
24	Phoenix	Three systems-OP
25	Hartford/New Haven	Two systems-OP
26	Cincinnati	OP
27	San Diego	Two systems-OP
28	Kansas City	OP
29	Milwaukee	UC
30	Nashville	OP
31	Charlotte	OP
32	Buffalo	OP
33	Providence/New Bedford	OP/OP
34	Orlando/Daytona Beach	Two systems-OP
35	New Orleans	OP
36	Memphis	OP
37	Columbus	Four systems-OP
38	Greenville/Asheville/Spartansburg	Three systems-OP
39	Grand Rapids/Kalamazoo/Battle Creek	Three systems-OP
40	Birmingham	OP
41	Raleigh/Durham	Two systems-OP
42	Oklahoma City	Two systems-OP
43	Louisville	Two systems-OP
44	Salt Lake City	OP
45	San Antonio	OP
46	Charleston/Huntington	Two systems-OP
47	Norfolk/Newport News/New Hampton/Portsmouth	Four systems-OP
48	Harrisburg/York/Lebanon/Lancaster	Four systems-OP
49	Wilkes Barre/Scranton	Two systems-OP
50	Albany/Schenectady/Troy	Three systems-OP

Legend
OP—operational
UC—under construction
FG—preliminary franchise award
FP—franchise pending
RP—request for proposal issued
BP—beginning process

Source: Titsch Communications Inc.